



Publications

"ATTORNEY CONSULTATIONS HELP KEEP A PRACTICE HEALTHY," PENNSYLVANIA CPA JOURNAL

"For many [accounting] practitioners, an hour in a dentist's chair is more appealing than the mere thought of picking up the phone and calling an attorney," writes Jonathan S. Ziss, Chair of Goldberg Segalla's Professional Liability Practice Group. "This mind-set needs to change for the health and well-being of your practice."

In the latest installment of Jonathan's "Liability Lessons" column in the *Pennsylvania CPA Journal*, a publication of the Pennsylvania Institute of Certified Professional Accountants, he notes, "Attorneys can provide routine preventive maintenance that will keep an accounting practice running smoothly, and they can respond to and repair problems should they arise ... commonly without too much time, expense, or personal discomfort."

Some of the top reasons for accountants and accounting firms to consult with counsel are:

- Responding to requests for comfort letters
- Engagement letters
- Client termination
- Conflicts of interest
- Collection of unpaid fees
- Discovery of evidence of fraud
- Lost/stolen laptop or victim of hacking
- Successor CPA requests for access to your records
- Discovery of an error in a prior year's tax return that you prepared

As one example, Jonathan writes, "Think of a comfort letter request from banks, lenders, landlords, and the like as a hand grenade rolled into your office with the pin still in place. You need to roll it back out without disengaging the pin. You will need to respond to a comfort letter request to the satisfaction of the user and your client, but also without exposing yourself to professional liability risk. This takes know-how. An attorney familiar with professional negligence can quickly assess whether a potential response goes too far and, if so, how to hem it in."

[Read the article here:](#)

"Attorney Consultations Help Keep a Practice Healthy," *Pennsylvania CPA Journal*, Spring 2017
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